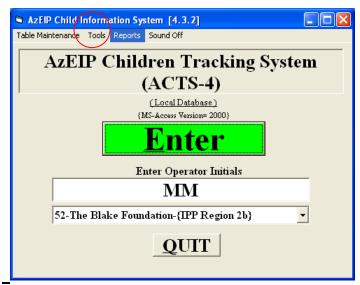
ACTS Reports and Tools

$\underline{AzEIP}\ \underline{C}hild\ \underline{T}racking\ \underline{S}ystem\ Reports\ and\ Tools$

User Guide

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A. Tools Available from the ACTS Log In Screen



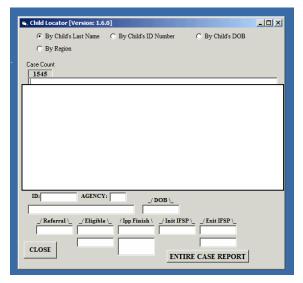
Accessing ACTS built-in tools-

- 1. Enter your initials on the ACTS log in screen. Click "OK to use this name"
- 2. Hit Tab key to activate Tools and Reports functions on the log in screen
- 3. Click on Tools on the ACTS menu bar; this will bring up a dropdown list of available tools.
- **1. Regional Zip Locator** You can use this application to identify the contractor and region for a zip code. This application looks to the built-in AzEIP zip code tables to find which region the zip is associated with.
- On the Log In screen, click on Tools, and select Regional Zip Locator from the dropdown list. This screen will appear:

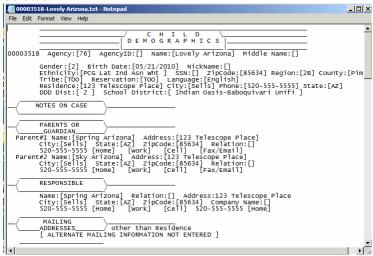


- Enter the zip code that you are researching.
- If the application finds the zip code in the tables, the contractor and region will be displayed on the Program line of the log in screen.
- When you are finished using the application, close the Zip Locator box and then re-set the program name to your program before continuing with data entry.

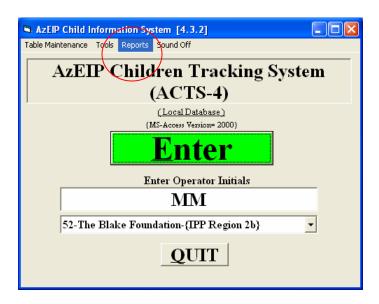
- <u>2. Child Locator</u>- In addition to locating a record based on a name, ID number, or DOB, this version will display a list of all child records for a region within a database.
- On the Log In screen, click on Tools, and select Child Locator from the dropdown list. This screen will appear:



- You have several search options; select one:
 - o By child's name
 - o By child's ACTS ID number
 - o By child's DOB
 - o By Region this option will list all children within the selected region
- After selecting a search option, start typing the name or DOB etc into the blank field. The list displayed below will scroll to records that match the information.
- Once you have located the record on the list, select it by double clicking on it. The information for that record will appear in the fields at the bottom of the screen.
- If you want to retrieve all of the case information for that record, click on Entire Case Report button at the lower right of the screen. A text file will open; this file can be saved, printed or deleted.

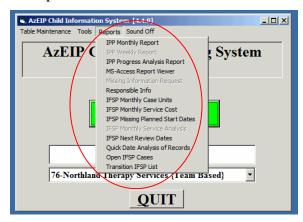


B. Reports Available from the ACTS Log In Screen



Accessing ACTS built-in reports-

- **4.** Enter your initials on the ACTS log in screen. Click "OK to use this name"
- **5.** Hit Tab key to activate Tools and Reports functions on the log in screen
- **6.** Click on Reports on the ACTS menu bar; this will bring up a dropdown list of available reports.



7. From this drop-down list, the following reports are currently available:

IPP Progress Analysis Report

Responsible Information

IFSP Missing Planned Start Dates

IFSP Next Review Dates

Quick Date Analysis of Records

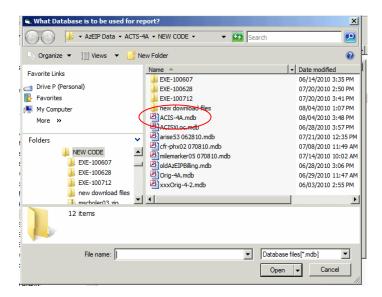
Open IFSP Cases

Transition IFSP List

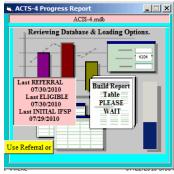
8. Click on the report that you want to run and a dialogue box will open. The following sections provide the directions for running each of the reports.

1. IPP Progress Analysis and Timeline Report-

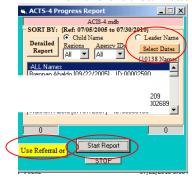
- Select the IPP Progress Analysis Report from the drop down list on the ACTS Reports menu.
- The following screen will appear, and you are asked to select the database that will be used for this report.
- Select the ACIS-4A.mdb



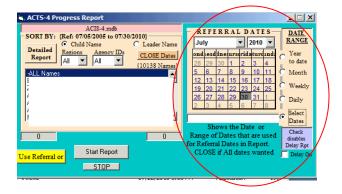
• The Progress Report screen will appear, with an advancing blue bar in the lower right corner.



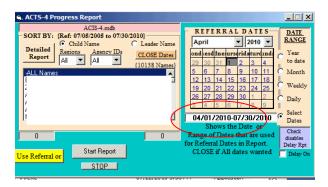
• When the blue bar reaches the top, the screen will change:



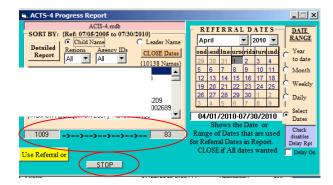
- At this point, you have can select various parameters for the report:
 - o Select to run the report for all children within a specified date range or
 - O Check Leader Name and select one Service Coordinator or Team Lead from the list and run a report for only their case load.
 - Select all records within a specified date range, based on the Referral date, Eligibility date, or initial IFSP date. Click on the small box on the lower left to switch between options.
- Click the orange Select Dates button to set the date range for the report. A calendar will open up.



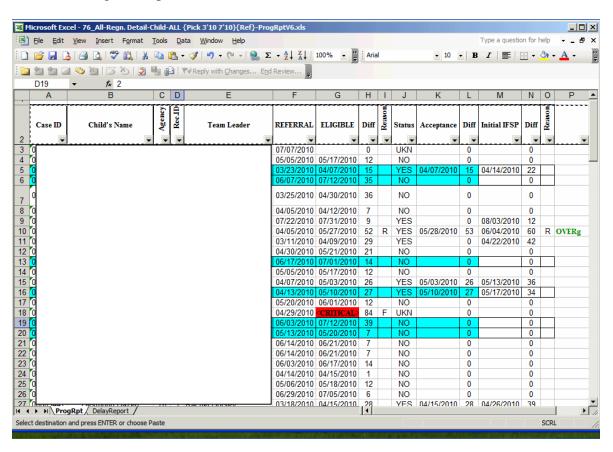
- To set the desired date range, first click on the Select Dates button under Date Range.
- Using the calendar, select the beginning year, month and date by pointing and clicking. The selected date will appear in the white box at the bottom of the calendar.
- Select the ending date for the report in the same way. There should now be a date range in the box.



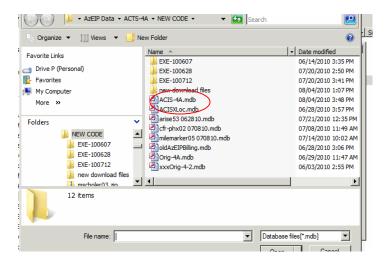
2. Click Start to begin building the report. You will see an arrow moving from left to right below the center box, as the report compiles the records.



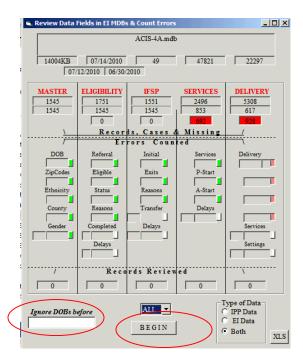
- 3. When the process is complete, the report will open up on your screen. There are two worksheets in the report, the Delay (45 Day Timeline) Report, and the Progress Report. The Progress Report lists all of the records within the specified time frame, and the Delay report performs and summarizes the 45 day timelines for those children in a table format.
- 4. Perform a File/Save As to save the file under a new name.
- 5. The Progress Report worksheet can be copied, sorted, and filtered to analyze the results.
- 6. When you close the report spreadsheet, you will be asked if you want to save the results.
- 7. After closing the report spreadsheet you will return to the report screen from which you can run another report with different parameters, or end the progress report function by clicking on Stop.



- 2. **Quick Date Analysis Report-** This report identifies records with specific missing data or with certain data errors.
- To get the most accurate results with this report, you must first run the ACTS Last Date.exe application against your ACIS-4A.mdb. When the report screen appears, click on the yellow Write to Origin Date button in the lower right corner, then close the screen by clicking on the x in the upper right corner.
- From the ACTS log in screen, select the Quick Date Analysis Report from the drop down list on the ACTS Reports menu.
- The following screen will appear, and you are asked to select the database that will be used for this report. Select the ACIS-4A.mdb.



 The Review Data screen will appear. If your database is large this may take a few minutes.



- In the lower left hand corner, you can enter a DOB. The report will ignore all records with a DOB earlier than this date.
- Click Begin. If your database is large it may take several minutes for the report results to appear.
- The report results will open automatically in an Excel file format.

ACIS-4A.mdb on 08/04/2010 Origin Date: 07/14/2010 No. of Tables: 49 Total Records: 47821 Data Records: RED = FUTURE Dates 22297 Master Records: 1545 **ORANGE = REPORT Problem Dates** Cases: 1545 Elig Records: 1751 Cases: 1545 Ifsp Records: 1551 Cases: 1545 Service Recs: 2496 Cases: 853 692=Missing Delivery Recs: 5308 617 928=Missing Cases: Report Date: 06/30/2010 NTST--Northland Therapy Services {Team Based} **MASTER DOB RECORDS Tested: 311** Date Of Birth Range: 10/02/2007 to 05/21/2010 TOTAL DOB ERRORS--<[0]>--} ſ **MASTER ZIP RECORDS Tested: 311 out** of 311 Zip Code Range: 85634 to 86047 TOTAL ZIPCODE ERROS--<[0]>--} MASTER Ethnicity RECORDS Tested: 311 out of 311 Ethnicity Range: 0 to

August 2010 Page 9 of 21 Wht [Invalid Ethnicity Code] DOB **AGENCY ETHNICITY** [MISSING ETHNICITY] DOB AGENCY **ETHNICITY** TOTAL ETHNICITY ERRORS--<[2]>--} ſ **MASTER COUNTY RECORDS Tested: 311 out of 311 COUNTY Range:** Apache to Pima **COUNTIES** INCLUDE:[Pima][Navajo][Apache] TOTAL COUNTY ERRORS--<[0]>--} MASTER G E N D E R RECORDS Tested: 311 out of 311 GENDER Range: 1 to 2 TOTAL GENDER ERRORS--<[0]>--} [**ELIGIBILITY REFERRAL RECORDS Tested: 1751 out of** 1751 REFERRAL Date Range: 05/21/1998 to 07/22/2010 [REFERRAL IS FUTURE DATE] **DOB** Agency Referral **EligDate Status** TOTAL REFERRAL ERRORS--<[1]>--} ſ **[ELIG DATE IS FUTURE** DATE] DOB Agency ReferralDate **EligibleDate Status** Reason ſ TOTAL DECISION DATE ERRORS--<[1]>--} TOTAL DECISION STATUS ERRORS--<[0]>--} [[TOTAL DECISION REASON ERRORS--<[0]>--} IFSP: INITIAL MEETING RECORDS Tested: 916 out of Initial IFSP Date Range: 05/27/1998 to

EligDate

Initial

Referral

Last-Revie

August 2010 Page 10 of 21

08/03/2010

DATE]

[Initial-IFSP IS FUTURE

DOB

Agency

[

IFSP: EXIT DATE RECORDS Tested: 859 out of 1551

EXIT Date Range: 10/08/2000 to

07/06/2010

SERVICE-IDs Tested: 2496 out of 2496

SERVICE ID Range: 1 to

18

[Missing Cases found in

MASTER table] DOB Agency [234]

[TOTAL SERVICE-ID ERRORS --<[0]>--}

[MISSING SERVICE

Planned Start] DOB Agency InitIFSP ServiceId PlannedStart ActualStart

[Actual-Start IS FUTURE

DATE] DOB Agency InitIFSP ServiceId IFSP_ID PlannedSt

[MISSING SERVICE

Planned Start] DOB Agency InitIFSP ServiceId PlannedStart ActualSta

[TOTAL MISSING Planned-Start DATE ERRORS --<[3]>--}

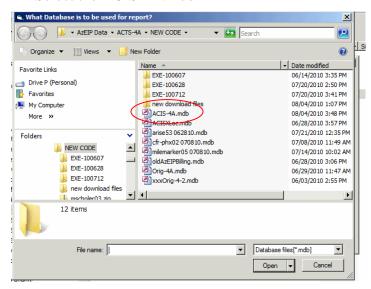
[MISSING SERVICE

Actual-Start] DOB Agency InitIFSP ServiceId PlannedStart ActualSta

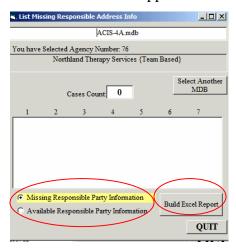
[TOTAL MISSING ASD ERRORS --<]]>--

3. Responsible Party Address Information Report

- Select the Responsible Party Report from the drop down list on the ACTS Reports menu.
- The following screen will appear, and you are asked to select the database that will be used for this report.
- Select the ACIS-4A.mdb



• This screen will appear:



- Select either Missing Responsible Party Information, or Available Responsible Party Information.
- Click Build Excel Report
- The report function will compile a list of all records with an open IFSP that either have or don't have responsible party information, and will display the address information that is available for each of the listed children. The report results can be saved.
- Finish by clicking on Quit.

4. IFSP Missing Planned Start Dates

- Select the Responsible Party Report from the drop down list on the ACTS Reports menu.
- A blue dialogue box will open



- The "Report Month" can be entered by either a value (1-12), an abbreviated spelling of the Months name (Jan, Feb, etc), or fully spelled out (June, July, etc.). When the entry box is exited the entry will be validated for correct form and fully spelled out in the box.
- The Report Year can only be entered as 4 digits, and can not be later than the current year. If the month or year is entered incorrectly, a warning message will be displayed and ACTS will return to the item that is incorrect.
- Click Create Report to being the report process. In a few seconds the report results will be displayed on the screen.
- You may review the report in Excel and save, print, or delete the report. You must give it a new file name when using the Save option.
- Click on the "Exit" button to return to the ACTS Log In screen.

ARIZONA DEPARTMENT OF ECONOMIC SECURITY Arizona Early Intervention Program Children Missing Planned Service Start Dates

Report Created on: 08/04/2010 3:51:24 PM

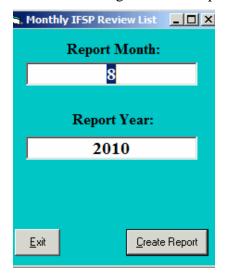
Reported By: 76 - Northland Therapy Services {Team Based}

Report Month: Initial IFSP Dates following August 2010

Cnt	Agy	AzEIP Case	Name	DOB	Service Description
1	76	00003518	Lovely Arizona	05/21/2010	Coordination

5. **IFSP Next Review Dates-**Identifies open IFSP records that are due for a 6 month review

- Select the Responsible Party Report from the drop down list on the ACTS Reports menu.
- A blue dialogue box will open:



- The "Report Month" can be entered by either a value (1-12), an abbreviated spelling of the Months name (Jan, Feb, etc), or fully spelled out (June, July, etc.). When the entry box is exited the entry will be validated for correct form and fully spelled out in the box.
- The Report Year can only be entered as 4 digits, and can not be later than the current year. If the month or year is entered incorrectly, a warning message will be displayed and ACTS will return to the item that is incorrect.
- Click Create Report to being the report process. In a few seconds the report results will be displayed on the screen.
- You may review the report in Excel and save, print, or delete the report. You must give it a new file name when using the Save option.
- Click on the "Exit" button to return to the ACTS Log In screen.

ARIZONA DEPARTMENT OF ECONOMIC SECURITY

Arizona Early Intervention Program Monthly IFSP Review List

Report Created on: 08/04/2010 3:54:16 PM

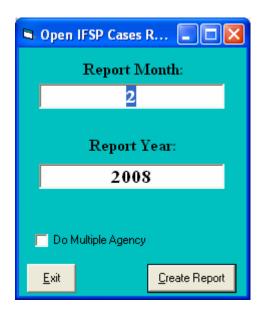
Reported By: 76 - Northland Therapy Services {Team Based}

Report Month: August 2010

Cnt	Agy	AzEIP Case	Name	Next Review Date					
	Parent/Guardian/Caregiver 1 Information								
1	06	00000000	Lovely Arizona	08/15/2010					

Spring Arizona; 123 Telescope Way; Sells.

6. The Open IFSP Cases Report displays all cases with an IFSP date and no Exit date.



- The "Report Month" can be entered by either a value (1-12), an abbreviated spelling of the Months name (Jan, Feb, etc), or fully spelled out (June, July, etc.). When the entry box is exited the entry will be validated for correct form and fully spelled out in the box.
- The Report Year can only be entered as 4 digits, and can not be later than the current year. If the month or year is entered incorrectly, a warning message will be displayed and ACTS will return to the item that is incorrect.
- Click Create Report to being the report process. In a few seconds the report results will be displayed on the screen.
- You may review the report in Excel and save, print, or delete the report. You must give it a new file name when using the Save option.
- Click on the "Exit" button to return to the ACTS Log In screen.

ARIZONA DEPARTMENT OF ECONOMIC SECURITY Arizona Early Intervention Program Open IFSP Cases Report

Report Created on: 08/05/2010 1:23:07 PM

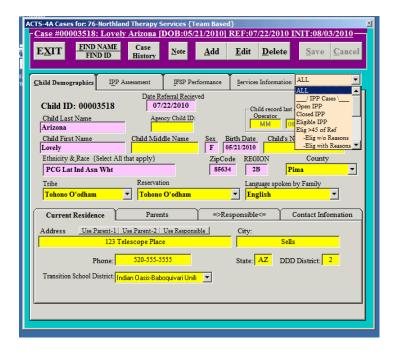
Reported By: 76 - Northland Therapy Services {Team Based}

Cnt	Agy	AzEIP Case	Name	DOB
1	76	00003518	Arizona, Lovely	05/21/2010

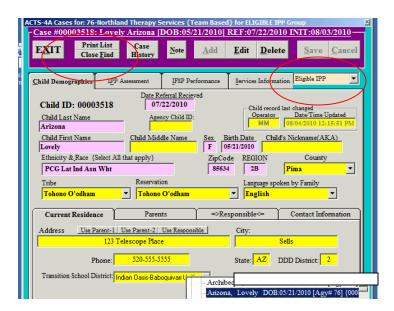
C. ACTS reports accessed from the data entry screens:

- **1. Group Selection** This **CASE CONTROLS** dropdown selection box is a feature that allows the user to select only a specific group of the current cases.
 - o ALL: All cases in the current selected agency group
 - o ___/ **IPP Cases** ___: Only cases with IPP & no Initial IFSP
 - OPEN IPP: Only cases that haven't completed IP Process are displayed
 - o **CLOSED IPP**: Only cases that have Eligibility = NO are displayed
 - o **ELIGIBLE IPP**: Only cases with Eligibility = YES are displayed
 - **ELIG >45 Days of REF**: All Cases with Eligiblity date Empty & >45 days from Referral date or Eligibility date > 45 days from Referral.
 - **-ELIG w/o Reasons:** Same as above without Reasons.
 - **-ELIG with Reasons:** Same as above but with Reasons.
 - o ___/ **IFSP Cases** ___: Only cases with Initial IFSP.
 - o **OPEN IFSP**: Only cases with Initial IFSP Dates and **no** Exit Dates are displayed
 - o **CLOSED IFSP**: Only cases with Initial IFSP Dates and Exit Dates are displayed
 - o **TRANSITIONED IFSP**: Same as Closed but only "IDEA" Eligible cases.
 - o **IFSP >45 Days of REF**: All Cases with Initial IFSP Dates that are Empty & >45 days or With a Date >45 days from Referral Date.
 - o -IFSP w/o Reasons: Same as {k.} and do not have a stored reason
 - o -IFSP with Reasons: Same as $\{k\}$ and \underline{do} have a stored reason
 - SERVICES ___: Only cases with a Service record.

SERVICE START >30 Days: All cases that include a PLANNED Start Date and NO ACTUAL Start Date over 30 days or with a Date but over 30 days from Planned Start Date.



- Click on the orange box that reads All.
- Select the group of records that you are interested in.



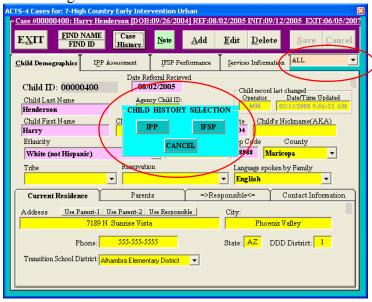
- If you want to print a list of the records, click Print List.
- The report will print in the following format.

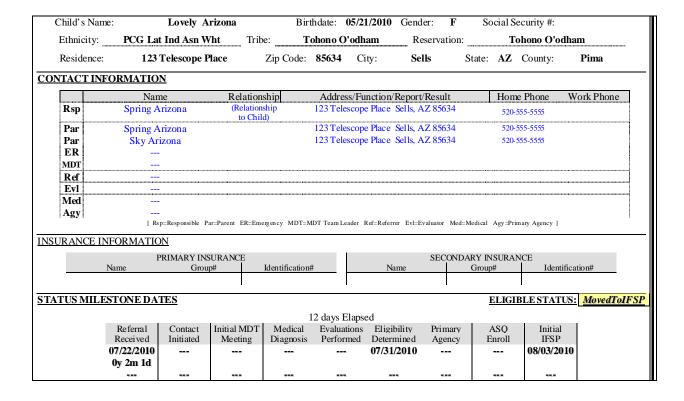
ACTS-4A Cases for: 76-Northland Therapy Services {Team Based} for OPEN IPP Group [14]

Alpha Last Name, First Name DOB Agency Case Id

2. Child History Reports

You can run, save and print individual Child History reports by clicking on the CASE
HISTORY button in the purple area at the top of the ACTS data entry screens and then
choosing IPP or IFSP



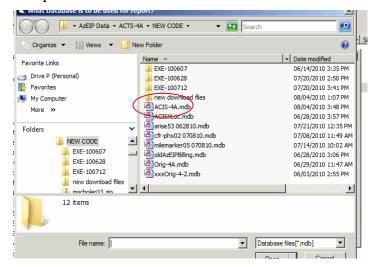


D. Additional Reports can be run against the ACTS database (mdb)-

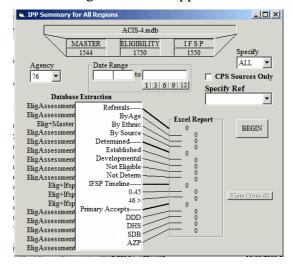
These reports are run from executable files (exe) developed by AzEIP, and utilize related report templates. These reports files are available for download on the AzEIP Data Transfer web site.

1. **IPP Summary Report**.

- This Report is created in an Excel spread sheet and includes a summary of referral, eligibility and IFSP activity for the selected program or region during the Date Range selected. This report includes information that is helpful from a program management perspective, including:
 - o The number of IPP records open at the end of each month
- Download the IPPSumAllRgnwithRefSrc+Age.exe file and the MstrProgRpt.xls from the Downloadable files section of the AzEIP data transfer site. Save the files to your ACTS folder.
- Open the ACTS folder and locate the IPPSumAllRgnwithRefSrc+Age.exe file. Double click on the file to start the report process.
- The following screen will appear, and you are asked to select the database that will be used for this report. Select the ACIS-4A.mdb.



• The following screen will appear:



- Use the Specify drop down list to select the age range for this report or leave blank and all ages will be included.
- Enter the beginning Month/Date/Year for the report (mm/dd/yyyy).
- Enter the end date for the report, or select the number of months for the report to cover.
- Select the referral sources that you want to include in this report, or leave blank and all referral sources will be included.
- Click Begin to start the report.
- The report will open automatically. You can save, print or delete the report. If you save the report, use Save As and give the report a new name so that the report template is not overwritten.

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}	REFERRALS	73	<==Re	ferral	Dates	within	Range						
,	E)'AGE		73	100%			NICITY		72	99%			
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1		Age-1	33	45%				Arian	. 4	6%			
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}		3>	0				Hi	rpanic:	2	3%			
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3	Public Heal	th Fac.:	1	120			1	100%	0	1			
4	Child Car	rø Fac.:	1	122			0	0%	0	0			
5		ASDB:	0	0%			0	0×	0	0			
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5	Total Hat Eliq		52	64%		Other:		17%					
6													
7	IFSP TIMELIHE	40	:==Initi	al IFSE	Date:	s within	n Rang	je –					
*	0-4	5 dayır:	18	45%		46-60	61-75	76-90	90+				
9	46	+ dayr:	22	55%	>	*	2	2	10				
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1 2 3 4		DHS: SDB: AzEIP:	0 20	0% 71%						ered :	mt - I	DDD, E	HS

2. Ages At Events Report

- This Report is created in an Excel spread sheet and presents a summary of referral, eligibility and IFSP activity based on the age of the children, within the Date Range selected.
- Download the AGESatEVENTS-3.exe.exe file from the Downloadable files section of the AzEIP data transfer site. Save the file to your ACTS folder.
- Open the ACTS folder and locate the IPPSumAllRgnwithRefSrc+Age.exe file. Double click on the file to start the report process. This screen will appear:



• Select the program (Agency), and enter a start date in the Start Date Range box. Then select the number of months that you which to be covered by the report (1,3,6,9 or 12 months). Click Begin.



• The report will open in an Excel file format. You can save, print or delete the file.

